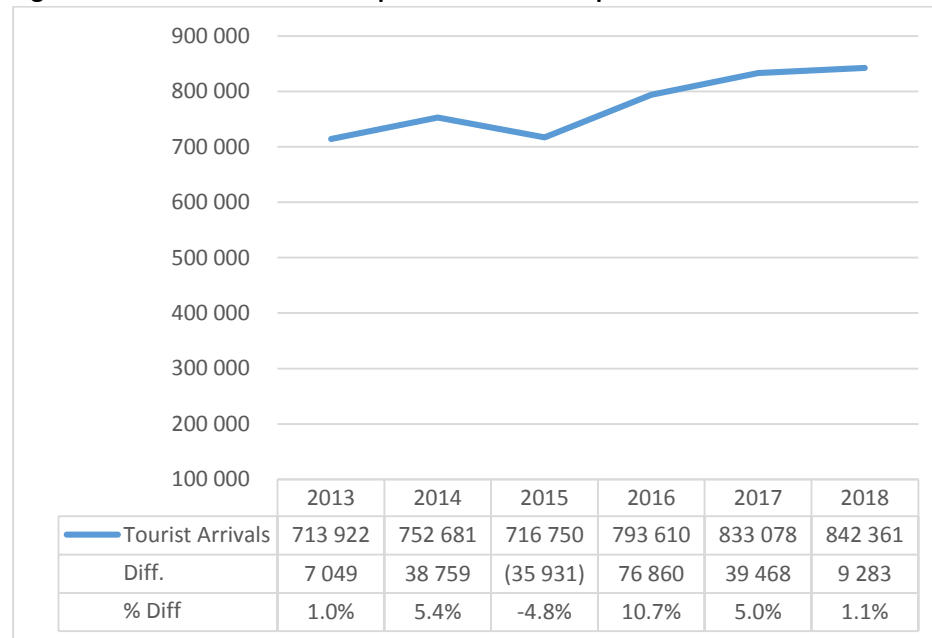


## SUMMARY ANALYSIS OF TOURIST ARRIVALS: SEPTEMBER 2018

### TREND ANALYSIS: SEPTEMBER 2013-SEPTEMBER 2018

A total of 842 361 tourist arrivals was recorded in September 2018, which was an increase of 1.1% (9 283) compared to the same month in 2017. Figure 1 below indicates tourist arrivals for the period September 2013 to September 2018. Tourist arrivals increased from 713 922 in 2013 to 752 681 in 2014, which was an increase of about 5.4%. Tourist arrivals decreased by -4.8% (-35 931) in September 2015 compared to the same month in 2014. Comparing September 2016 with September 2015, there was a double digit growth of 10.7% (76 860) in tourist arrivals during this period. In 2017, tourist arrivals increased by 5.0% (39 468) moving from 793 610 in 2016 to 833 078 in 2017.

**Figure 1: Total Tourist Arrivals September 2013 to September 2018**



### SEPTEMBER 2018 COMPARED TO SEPTEMBER 2017 BY REGION

Table 1 below indicates tourist arrivals by region for September 2018 compared to the same month in 2017. Arrivals from overseas markets increased by 0.2% (465) during this period. Central and South America recorded the highest increase (18.8%), followed by Middle East (14.0%) and North America (1.2%). Regions that recorded a decline were Australasia (-4.5%), Asia (-4.1%) and Europe (-0.4%) in September 2018 compared to September 2017. Africa recorded an increase of 1.4% (8 931) and this region remains the main source of tourist arrivals to the country, accounting for about 75.0% (631 991) of total arrivals during this month.

**Table 1: Total Tourist Arrivals by Region: September 2018 vs. September 2017**

Region	September 2017	September 2018	Difference	% Difference
EUROPE	115 148	114 738	-410	-0.4
NORTH AMERICA	38 535	38 990	455	1.2
CENTRAL & SOUTH AMERICA	8 565	10 174	1 609	18.8
AUSTRALASIA	15 031	14 348	-683	-4.5
MIDDLE EAST	4 358	4 967	609	14.0
ASIA	27 083	25 968	-1 115	-4.1
TOTAL OVERSEAS	208 720	209 185	465	0.2
Africa Land	597 450	603 515	6 065	1.0
Africa Air	25 610	28 476	2 866	11.2
TOTAL AFRICA	623 060	631 991	8 931	1.4
Unspecified	1 298	1 185	-113	-8.7
GRAND TOTAL	833 078	842 361	9 283	1.1

## JANUARY-SEPTEMBER 2018 COMPARED TO JANUARY-SEPTEMBER 2017

Arrivals for the period January-September 2018 compared to the same period in 2017 are indicated in Table 2 below. Total tourist arrivals (7 727 732) went up by 2.2% for the period January to September 2018 compared to arrivals recorded during the same period in 2017 (7 564 484). Total tourist arrivals from the overseas market declined by -1.2% (-22 314), which was influenced by a decline recorded in the Middle East (-10.7%), Asia (-2.7%), Europe (-2.0%) and Australasia (-1.4%). Tourist arrivals from Africa increased by 3.3% (185 130) during the same period under review. Compared to other regions, the Central and South America region had the highest growth of 10.4% (8 196) during this period. The growth from this region was driven by an increase of about 29.8% (3 535) of tourist arrivals from Argentina. Most countries within the Europe region recorded a decline in tourist arrivals with Portugal having the highest decline of -20.4% (-5 815) for the period under review. The declining growth recorded in the Middle East was driven by Iran and Saudi Arabia with both countries recording a decline of -34.8% (-1 550) and -30.1% (-2 921) respectively during the same period under review. The decline in Asia was driven by a decrease recorded in tourist arrivals from most countries from this region including India and China with a decline of -4.9% (-3 600) and -1.3% (-965) respectively for the same period under review.

**Table 2: Total Tourist Arrivals by Region Jan-Sept 2018 vs. Jan-Sept 2017**

Region	Jan to Sept 2017	Jan to Sept 2018	Difference	% Difference
EUROPE	1 135 745	1 113 373	-22 372	-2.0
NORTH AMERICA	327 990	332 304	4 314	1.3
CENTRAL & SOUTH AMERICA	78 828	87 024	8 196	10.4
AUSTRALASIA	99 646	98 235	-1 411	-1.4
MIDDLE EAST	43 828	39 117	-4 711	-10.7
ASIA	238 538	232 208	-6 330	-2.7
TOTAL OVERSEAS	1 924 575	1 902 261	-22 314	-1.2
TOTAL AFRICA	5 630 726	5 815 856	185 130	3.3
Unspecified	9 183	9 615	432	4.7
GRAND TOTAL	7 564 484	7 727 732	163 248	2.2

Table 3 gives the rankings of the top ten African source markets for the period January-September 2018 compared to January-September 2017. Most of the top ten African markets remained at the same position for the period under review. Malawi improved its position moving from 7<sup>th</sup> to 6<sup>th</sup> position while Namibia dropped from 6<sup>th</sup> to the 7<sup>th</sup> position in 2018. Angola and Nigeria also swapped positions, with Angola moving to the 9<sup>th</sup> position and Nigeria to the 10<sup>th</sup> position for the period January-

September 2018 compared to January-September 2017. Most countries from the top ten African source markets recorded an increase in tourist arrivals during this period except for Namibia (-4.1%), Zambia (-3.5%) and Swaziland (-0.3%). Angola had experienced the highest growth of 38.2%, which translates to additional 13 331 tourist arrivals from Angola during the period under review.

**Table 3: South Africa's Top 10 African Source Markets: Jan-Sept 2018 vs. Jan-Sept 2017**

Country	RANK-2018	Tourist Arrivals 2018	RANK-2017	TOURIST ARRIVALS 2017	% Change from 2017 to 2018
Zimbabwe	1	1 636 726	1	1 520 802	7.6
Lesotho	2	1 354 767	2	1 339 879	1.1
Mozambique	3	1 027 595	3	1 004 183	2.3
Swaziland	4	646 837	4	649 007	-0.3
Botswana	5	488 368	5	479 534	1.8
Malawi	6	146 238	7	128 186	14.1
Namibia	7	142 945	6	148 987	-4.1
Zambia	8	122 982	8	127 403	-3.5
Angola	9	48 263	10	34 932	38.2
Nigeria	10	39 415	9	38 311	2.9

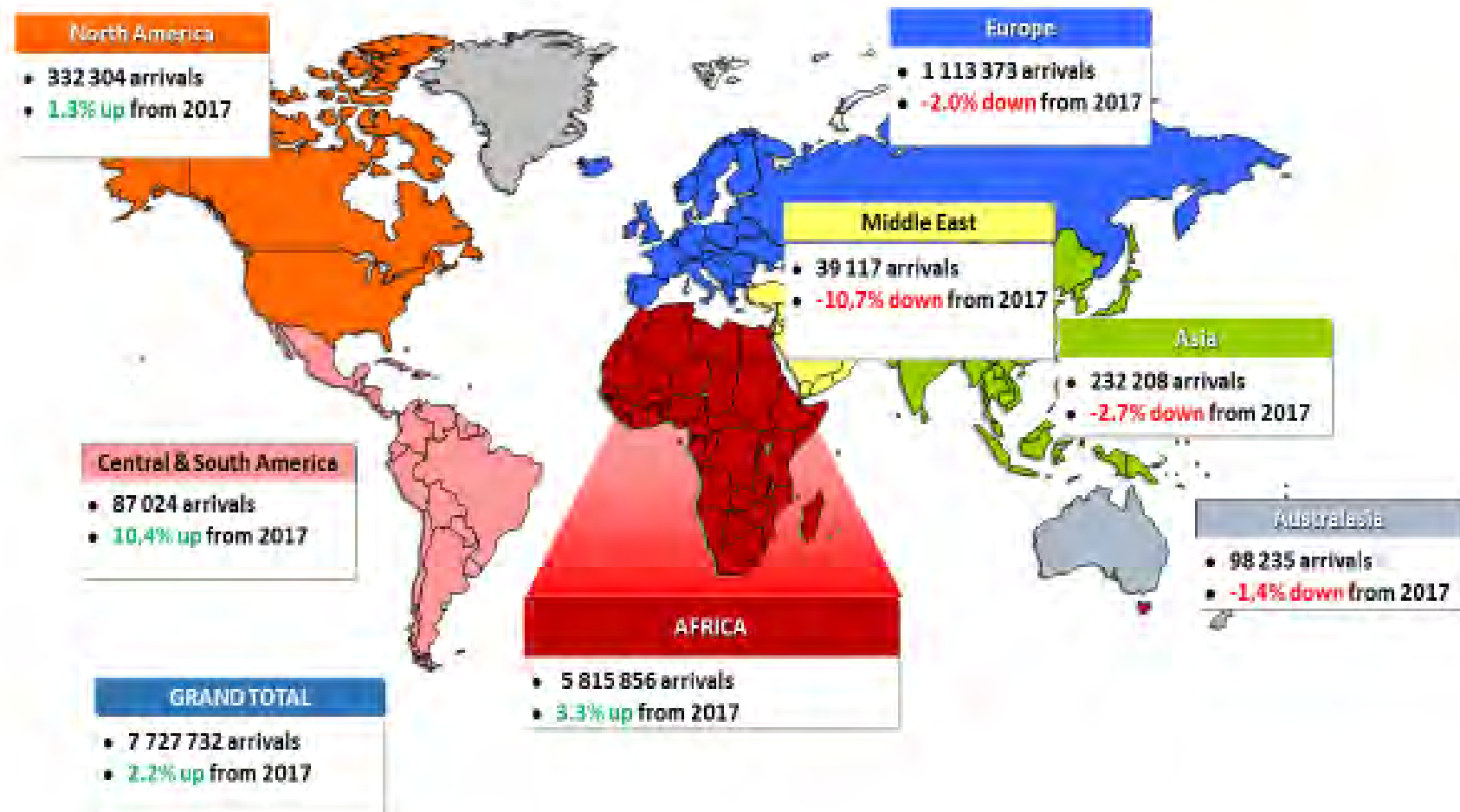
Table 4 shows rankings of top ten overseas source markets. Comparing Jan-September 2018 with Jan-September 2017, most top 10 overseas markets recorded a decline except for Brazil (7.2%), USA (1.5%) and Canada (0.3%). Despite this decline, most of the top ten overseas markets remained in the same position. China and India swapped positions, with China moving to 7<sup>th</sup> position and India to 8<sup>th</sup> position for the period Jan-September 2018 compared to Jan-September 2017. UK remains the main source market from overseas even though this country recorded a declining growth of -4.2%.

**Table 4: South Africa's Top 10 Overseas Source Markets: Jan-Sept 2018 vs. Jan-Sept 2017**

Country 2018	RANK-2018	Tourist Arrivals 2018	RANK-2017	TOURIST ARRIVALS 2017	% Change from 2017 to 2018
UK	1	305 156	1	318 426	-4.2
USA	2	285 307	2	281 130	1.5
Germany	3	224 406	3	224 803	-0.2
France	4	129 146	4	134 226	-3.8
The Netherlands	5	101 599	5	110 976	-8.4
Australia	6	87 126	6	87 155	0.03
China	7	72 752	8	73 717	-1.3
India	8	70 558	7	74 158	-4.9
Brazil	9	51 729	9	48 243	7.2
Canada	10	46 997	10	46 860	0.3

TOTAL TOURIST ARRIVALS TOP TEN OVERSEAS AND AFRICA MARKETS: JANUARY-SEPTEMBER 2018 COMPARED TO JANUARY-SEPTEMBER 2017.

Figure below gives a snap view of tourist arrivals to South Africa by regions for the period January-September 2018.



TOTAL TOURIST ARRIVALS BY REGION JANUARY-SEPTEMBER 2018 COMPARED TO JANUARY-SEPTEMBER 2017

TOP FIVE OVERSEAS  
SOURCE MARKETS

Country	Arrivals
UK 	305 156 -4.2% down from 2017 
USA 	285 307 1.5% up from 2017 
Germany 	224 406 -0.2% down from 2017 
France 	129 146 -3.8% down from 2017 
Netherlands 	101 599 -8.4% down from 2017 

TOP FIVE AFRICA  
SOURCE MARKETS

Country	Arrivals
Zimbabwe 	1 636 726 7.6% up from 2017 
Lesotho 	1 354 767 1.1% up from 2017 
Mozambique 	1 027 595 2.3% up from 2017 
Swaziland 	646 837 -0.3% down from 2017 
Botswana 	488 368 1.8% up from 2017 